

Scope of Work [FACILITY NAME] Strategic Sustainability Plan

MONTH, DAY,
YEAR

Buyer: [COMPANY NAME]

Seller: [COMPANY NAME]

Purpose: Create a plan to transform the [FACILITY NAME] Sustainability into a leading-edge model for the Government. Assess current progress towards compliance with federal mandates, create baselines for each measureable area, benchmark against industry best practices, and develop a long-term Strategic Sustainability Plan (SSP). This plan will provide a roadmap to meet or exceed the mandates while simultaneously achieving triple bottom line criteria (economic, social, and environment) and transforming the [FACILITY NAME] culture.

Note: The site has already initiated a Strategic Energy Management Plan which will provide a thorough analysis and recommendations for compliance with energy mandates. Seller does not need to recreate any of this work, but should capture the results in this SSP effort, which will be considered a higher level plan.

Phase 1: Baseline Sustainability Assessment

Seller shall evaluate through interviews with site personnel and building management, research, and site observations, the current policies and strategies utilized at the site regarding the following items:

1. Water Efficiency

- Irrigation practices
- Storm water management
- Metering
- Plumbing fixture consumption

2. Sustainable Sites

- Landscaping practices
- Exterior lighting – light pollution reduction
- Heat Island reduction – roof and pavement surfaces
- Alternative transportation practices – bicycle storage, hybrid vehicle use, carpooling, and telecommuting
- Construction/renovation practices

3. Materials & Resources

- Toxic material source reduction (mercury light bulbs)
- Sustainable purchasing (Use of rapidly renewable materials, recycled products)
- Recycling (paper, plastic, computers, etc.)

4. Indoor Environmental Quality

- Asbestos-containing materials operations and maintenance policies
- Polychlorinated biphenyls (PCB) containing equipment
- Outdoor air ventilation rates/ building pressurization
- Indoor chemical and pollutant source control (air filters and copy room ventilation)
- Operating and Maintenance standards
- Green cleaning practices
- Green pest management practices

5. Energy Management & Greenhouse Gas Emissions

- Review existing energy management plan and incorporate significant findings

In each category, Seller shall summarize the current practices, benchmark against industry standards, and provide recommendations for practical initiatives that can be implemented. Where applicable, Seller shall use ENERGY STAR criteria and the Leadership in Energy and Environmental Design (LEED) for Existing Buildings rating system as a guide for recommendations as well as to benchmark current practices. In addition, Seller shall perform the following actions relative to Energy Management, Greenhouse Gas Emissions, and Federal Mandates:

6. Federal Mandates

- Review current practices and identify general compliance status with the following federal mandates:
 - Executive Order 13423
 - Executive Order 13514
 - Energy Policy Act of 2005
 - Energy Independence and Security Act of 2007
- Provide recommendations to work towards meeting the required goals within these mandates

Seller shall provide a draft report of Phase 1 findings within 30 days from completion of fieldwork. In order to meet this schedule, the Buyer shall provide security escorts and escorts with the appropriate knowledge to answer questions and provide the data necessary for our baseline assessment. This will include people from [COMPANY NAME], the facility management group, and others.

The Seller plans to have 3-4 people on site for 3 days. A tentative schedule is outlined below:

Day 1 - Kickoff meeting, walking tour of grounds and non-secure areas, and meetings

9:00 - 10:00 - Kickoff Meeting

10:00 - 12:00 - Grounds/overall Tour

12:00 - 1:00 - Lunch

1:00 - 2:00 - Meet with landscaping/irrigation dept and tour

2:00 - 2:30 - Meet with pest management (indoor/outdoor)

2:30 - 3:30 - Meet with cleaning department and tour

3:30 - 4:00 – Meet with construction department

Day 2 - Site Walkthrough (all buildings and spaces available) – Seller will need energy manager or facility manager for a few hours. This walkthrough will focus on energy-consuming equipment, water-consuming equipment and fixtures, and building specific issues such as lighting, asbestos, PCBs, waste handling equipment and others. During our walkthrough we will also need someone knowledgeable about facility operations with us at all times.

Schedule, continued

Day 3 - Morning - building walkthrough, continued. Afternoon meetings

9:00 - 12:00 - Building walkthrough continued. Plan for us to break up into two groups during this time with separate escorts

12:00 - 1:00 – Lunch

1:00 - 2:00 - Meet with procurement and waste handling

2:00 - 3:00 - Meet with ESH group

3:00 - 4:00 TBD

Seller will organize the baseline assessment, to the best of our ability, to correlate with the nine categories previously determined by the [FACILITY NAME] Sustainability Program Components:

1. Education and Partnership
2. Energy

3. Environment
4. Green Construction
5. Green Purchasing
6. Operations & Maintenance
7. Transportation
8. Waste Management
9. Water

- Upon completion of fieldwork and interviews for the baseline assessment (items 1-6), Seller shall make recommendations regarding the staffing needs for maintaining a robust [FACILITY NAME] Sustainability Program and implementing projects recommended in Phase 2.

Phase 2: Sustainability Strategic Plan

Seller shall incorporate the findings of the sustainability assessment into a long-term sustainability strategic plan. Seller shall outline the plan goals as a strategy framework for implementation of the plan. The plan will provide opinions of cost for each recommendation and prioritize the projects by feasibility (low, medium, high) and other potential parameters identified by the client. The plan will include the development of key performance indicators to monitor the progress of the plan and metrics to measure progress against the goals. Seller shall focus on three main components of the plan:

- **Prioritize** – Summarize sustainable opportunities and rank based on criteria developed during the evaluation process.
- **Implement** – Create checklist of potential low-cost or no-cost opportunities and calculate the estimated savings for each initiative.
- **Monitor** – Define monitoring approach based on findings from the evaluation process

Seller shall deliver one on-site presentation of the plan to key [FACILITY NAME] personnel.

Phase 3: Education and Training

Seller shall provide education materials and training to educate both the building occupants and the key [FACILITY NAME] personnel responsible for implementing the sustainability plan.

1. Building Occupants/General Population

- Create a 1-2 page brochure that summarizes key elements of the plan and how occupants can be an active participant in the success of the plan.
- Create a 1-2 page brochure more suited to the general public and visitors to the facility. This brochure will focus on the accomplishments of the facility and key performance indicators such as energy savings, water savings, greenhouse gas emissions reduction, or other elements selected by [FACILITY NAME].
- Create a 15-minute, 20-slide webinar that will be delivered and recorded so that it can be utilized by the customer and incorporated into in-house training programs and catalogs.

2. Key [FACILITY NAME] Personnel

- Prepare and deliver one (1) two-day workshop to key [FACILITY NAME] personnel. The workshops will be live, instructor led training held at a facility provided by and coordinated through the customer in [CITY, STATE]. The size limit of the workshops is 10 - 15 people per workshop. These workshops will include the following elements:
 - Train the trainer – teach attendees instructive techniques and methods for successful training. The goal is to create facilitators of knowledge within the key implementers of the sustainability plan.
 - Actual workshop delivery – Seller will deliver the actual workshop which will include the key steps to implement the plan, the accompanying goals, key performance

- indicators, and strategies for achieving compliance with the plan.
 - Workbook – the attendees of the workshop will receive a workbook comprised of key slides and information, learning activities, and other pertinent information. This will provide the attendees with a tool when acting as a facilitator for this workshop.
 - Slides – the attendees of the workshop will receive electronic versions of the slides with speaker notes to use when delivering the workshop.
- Prepare a comprehensive handbook on the Strategic Sustainability Plan. The handbook will be a “How To” guide for implementation of the Strategic Sustainability Plan. The plan will include following elements:
 - A copy of the Strategic Sustainability Plan divided up into key elements.
 - For each key element, the handbook will explain how to obtain information necessary for key performance indicators, how to measure compliance and monitor progress.
 - Procedures related to the elements of the plan (recycling, maintenance, custodial, etc.) will be supplied by the customer to the seller and incorporated into the plan.

Seller will provide the customer with a draft electronic version of the handbook and will respond to two sets of review comments. A final electronic version will be delivered to the customer. In an effort to be sustainable, no hard copies will be provided.

Phase 3 is anticipated to begin after plan acceptance within [FACILITY NAME]. Seller will complete the scope of services for Phase 3 within 90 days after plan acceptance.

Phase 4: Green Guide

Seller shall provide a handbook that explains the mission, vision, and guiding principles of the organization and how sustainable use of site, water, energy, materials, environment, supports the [FACILITY NAME] strategic theme of resource management. This handbook would be a comprehensive educational tool for other facilities in the intelligence community to evaluate and implement a sustainability plan of their own using the techniques and strategies developed at the [FACILITY NAME]. This guide could become a model for sustainability efforts within the intelligence community, similar to the GreenGuide for Embassy & Consulate Operations. The handbook will be limited to 150 pages and will include a summary of the category as well as goals, best practices, and case studies for each of the following categories:

- Water
- Site
- Materials & Resources
- Indoor Environmental Quality
- Energy and GHG Emissions
- Federal Mandates

Seller will provide the customer with a draft electronic version of the handbook and will respond to two sets of review comments. A final electronic version will be delivered to the customer. In an effort to be sustainable, no hard copies will be provided.

After completion of the first three phases, the scope of this handbook could be better defined and a firm price can be associated with it.